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ABSTRACT

This paper describes the Ensuring Quality Leadership (EQL) program implemented cooperatively by faculty at the University of Wisconsin-Milwaukee School of Education and School of Business Administration, business executives from the Milwaukee area, and principals from Milwaukee's Public Schools (MPS). The program was designed to: (1) provide expert resource people, mentoring, and interaction with university faculty to MPS principals; (2) provide a continuing forum for principal interaction with colleagues in order to establish a network of principals with a common vision for schools and leadership; (3) provide a forum for university faculty to work together with input from principals and business executives to develop a greater understanding of the leadership needs of principals; (4) redesign the preparation program for future MPS administrators and the curriculum for future principals; and (5) be a model of system-wide leadership for other school districts. Program participants met monthly to listen to presentations and then later reflect in discussion groups. This paper describes program participants, program presentations during the first year, opinions of program participants after the first year, program presentations during the second year, and hurdles faced during program implementation. (SM)

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ED 431 765

Ensuring Quality Leadership

A Program Funded by the GE Fund
(Formerly the General Electric Foundation)

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The purpose of the GE Fund's "BEST" (Business and Education School Teaming) Initiative is "...to share with the education community best practices from the business community..." with the hope that such sharing "...can lead to a more productive public education system" through enhancing "the effectiveness of today's and tomorrow's elementary, middle and high school administrators, as well as leaders at the school district level...."

In response to the Request for Proposals from the GE Fund, a faculty member of the University of Wisconsin-Milwaukee (UWM) School of Education and and a faculty member of the UWM School of Business Administration designed a program linking elementary, middle and high school principals of the Milwaukee Public Schools (MPS) with faculty from both UWM schools as well as with business executives from the Greater Milwaukee area.

The expected outcomes of the Ensuring Quality Leadership (EQL) program were described in the proposal as follows:

1. By providing expert resource people and interaction with, and mentoring by, university faculty and business executives, we expect that a group of MPS principals will be introduced to state-of-the-art knowledge and develop the skills that will enable them to lead and manage their schools more effectively.

2. By providing a continuing forum for principal interaction with colleagues, with expert coaching, we expect to have established a network of principals who share a common vision for MPS and have the leadership skills to implement and manage change.

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3. By providing a forum for School of Business and School of Education faculty to work together with input from principals and business executives we expect to develop a greater understanding of the leadership needs of MPS principals and to design a curriculum that will embody the best practices of leading businesses, while being responsive to the unique needs of public schools.

4. By redesigning the preparation program for future MPS administrators and providing the curriculum to a cohort of future principals, we expect that these future administrators will be well prepared to lead and manage the schools to which they are assigned.

5. By fully implementing this proposal, we expect that this program will serve as a model of system-wide leadership that will be useful to other public school districts.

The EQL program was originally designed around three cohorts of participants, each cohort to include school principals, business executives, and faculty members from the School of Education and from the School of Business. Program participants were to meet once a month for a two-part program.

The first segment, in the morning, was to feature presentations on topics within three broad subject areas:

Transformational Leadership: leadership characteristics, transforming organizations for the twenty-first century, managing change, continuous improvement, creating a vision, etc.

People Skills: communication, team building, shared decision making, conflict management, managing multiple constituencies, etc.

Technical Skills: core management practices including budgeting and fiscal management, allocating resources; marketing, data-based decision making, use of technology, etc.

Presentations by individuals recognized, nationally or locally, for their contributions and knowledge in management and leadership, were to be made to the entire group of participants, followed by a question and answer period and discussion.

The second component, following lunch, was to take place in the cohorts. The purpose of this component was to enable reflection on an issue, problem, opportunity or situation in one's organization and to solicit the perspectives of others in the cohort. Over the long term, this component was to serve as a vehicle for the development of a peer support group, characterized by mutual trust, open communication and positive reinforcement among colleagues.

The process in the cohorts involved two discussions: first, an open forum for an update on significant developments in one's organization or a discussion on a pressing issue; and second, the presentation of cases by one or two cohort members. Each presenter was to provide the cohort members with a one page outline with information about the issue, problem, opportunity or situation and also a question or questions to guide the discussion. Cohort members would then ask clarifying questions about the case and share perspectives regarding the issue, problem, opportunity or situation. The presenters would "update" their colleagues at future meetings.

An additional part of the proposal addressed the intention to redesign the School of Education's principal preparation program to include the best practices of business in the education of prospective principals. A special cohort of MPS teachers who were identified by their principals as having demonstrated a capacity for leadership was formed and embarked on a two-year program leading to a master's degree and Wisconsin certification as a school principal. This cohort will complete the program this summer.

The First Year

After receiving the grant from he GE Fund, the first task was to recruit participants for the

program. Although we had originally envisioned smaller groups, asking for volunteers resulted in 36 principals, representing elementary, middle and high schools; 9 business people including CEO's, plant managers, a human resource director and other staff people, and owners of small businesses; and six faculty, three each from the School of Business and from the School of Education. Each of the cohorts, then, had seventeen members: 12 principals, 3 business people and 2 professors.

The Ensuring Quality Leadership program at UWM began in February, 1997 with a presentation on creating an effective vision by Katherine M. Hudson, President and CEO of the W.H. Brady Co., a prominent Milwaukee-based manufacturing firm. Although complicated by a major snowstorm, the first session was an exciting beginning for the program. In March, April and May, the topics of the morning sessions were:

- Understanding and Adapting to Communication Styles
- Assessing and Developing your Leadership Style
- Conducting Needs Assessments

Unfortunately, the dialogue component of the program went less well. First, we lost people at lunch. Many principals felt uncomfortable being away from their schools for an entire day. We tried a different starting time in order to give principals an opportunity to spend part of the day in their schools, but this still did not work to everyone's satisfaction. Second, the cases that were developed for the discussions frequently were not compelling enough to hold all the participants. By the end of the first four months, it was clear that the dialogue sessions were not going to work and they were essentially abandoned as the school year came to an end. We have struggled ever since with efforts to incorporate the discussion and dialogue that we still feel is an essential part of the program.

During the summer after the first couple of months of the program, a small group of participants met with faculty members to design the first full year of the program. New participants were recruited to replace some principals and business people who chose not to continue. Interestingly, five of the original cohort of 36 principals were promoted to central office positions and felt they no longer would have time to participate regularly. As a result, the program lost several of the more articulate and dynamic group leaders.

The monthly sessions that began in September, 1997 included presentations on the following topics:

- Strategic Image Development and Marketing
- Budgeting and Financial Management
- Team Building and Tools for Team Excellence
- Taking Advantage of Technology
- A Skill Day allowing choices among personal leadership, time management, conflict management, basic meeting skills
- Leading Organizational Turnarounds

In addition, the participants attended the Metropolitan Milwaukee Association of Commerce's 13th Annual Quality Symposium featuring Stephen Covey and Charlotte Roberts and visited two Milwaukee companies:

- Rockwell International's Allen Bradley Co., focusing on leadership development
- Harley-Davidson, focusing on building constructive and creative union-management relationships

In the two visits, presentations were made by company representatives and the discussions involved company employees as well as EQL participants.

Interviews with participants at the end of the first full year resulted in the following illustrative comments from principals:

The most valuable aspect of the program has been the opportunity to have conversations

with other people. There is no other place or time where we can do that. The sessions produce an environment for people to talk and think.

Business practices are applicable to schools in a general sense, although schools are constrained by the fact that they do not know what their product is. I've learned that businesses have constraints that I wasn't aware of.

I don't know if my actual skills have developed as a result of my involvement, although the exposure to business philosophies is interesting. I am trying to involve the staff more in decision making. After the session at Rockwell, I approached them to become a business partner with my school and they agreed.

The most valuable aspect of the program so far has been the networking, particularly with the business people because we really have so little time to do that.

I definitely have been able to utilize the information from the sessions. The communication styles information has been useful in my day-to-day interactions with staff, parents and students. Also, the Leadership Practices Inventory gave me the opportunity to evaluate my leadership style. Because of the marketing session, I have become more aggressive in promoting my school--I've developed a brochure and had business cards made for my staff. The biggest benefit is networking and the opportunity to share with counterparts in the business world and come to an understanding of the issues facing educators.

I can't name any specific skills I've developed, but I appreciate the opportunity to develop relationships with people other than educators. It helps to gain different perspectives. The networking is very important--I don't often get the chance to speak with my peers.

I used the skills from the meeting session right away. Also the marketing piece was very good and I've worked with my teachers on presenting the school in a positive image. My communication skills have improved at all levels and also team building skills, although not specifically from that session, but just generally from attending and bringing information back to the staff.

I had an opportunity to job shadow [a business participant] last summer and felt it was really beneficial. I brought back ideas to use in my school--signs publicizing the number of days without suspensions, employee recognition with drawing for a gift certificate

A comment by a business participant helped me establish a data system which monitors performance on a six-week cycle instead of the 36 week cycle. I have greater confidence in promoting change. I value the participation of staff in decision making and change design rather than fearing it.

Participants from business also had comments:

> I've come to the realization that educators are hard working, well intentioned, but limited by the confines of the institution. I've gained an appreciation of them as individuals with a desire to perform their jobs effectively.
>
> The team building session was one of the most useful from the standpoint of the group and the function of this particular group. None of the sessions were not useful. There was a lot of information I already know, but it was still useful.
>
> The biggest personal benefit has been the knowledge and understanding I've gained about the children in the school system, contrary to the media perception. I'm working to start a co-op program with [ ] high school, a direct result of the project. This will be a long term resource system for the students.

An unpublished evaluation of the EQL program by Sparrow (1998) concludes with the following:

> By and large, this program is perceived positively by the participants. When evaluated against Kirkpatrick's four levels, the project does show some strengths. At the first "reaction" level, Ensuring Quality Leadership receives high marks. Participants felt that the project was satisfactory and useful to them. Even participants who were not regularly attending, stated that the premise of the project was commendable. Assessing at the second "learning" level, the project again does fairly well. Participants felt that they gained knowledge in some specific areas of management and leadership. Principals felt they had a better understanding of many of the practices that make businesses successful, and business participants learned about the constraints under which principals operate. This increased understanding constitutes a powerful form of learning that could help pave the way for increasing positive interaction between schools and the business community. The third level, involving transfer of this knowledge to the everyday work setting, is where the project exposes some weaknesses. It is difficult for most of the participants to names a specific competency they felt they had developed through their participation in Ensuring Quality Leadership. When asked about the effect of the project on their day-to-day practices, participants often were unable to specify something that they had transferred to this area. Finally, assessment at the fourth level (looking at the bottom line results) is virtually an impossibility at this time. Because schools do not deal with financial results, and their product is difficult to define, school improvement measures must be specified and then assessed at the conclusion of the project. (pp. 37-38).

The Second Year

Based on input from the participants, as well as feedback from interviews and the outside

evaluation, the program for the second year was developed during the summer of 1998. The decision was to maintain the direction of the previous year, but to make greater efforts to include the desired dialogue and discussion within the meetings. We had seriously considered developing the second year around an improvement project in each of the schools (and, indeed, developed the first session around this focus), but eventually gave up on that idea because we did not want to add additional pressures on the participating principals. The one new feature was to hold one of the sessions at the school of one of the participants and focus the discussion on some of the innovative aspects of that school.

The sessions for the second year, including those that are still to take place are as follows:

- Process Focus and Continuous Improvement
- Team Building
- Organizational Change
- Relating Effectively with the Media
- Assessing and Developing Organizational Culture
- A Skill Day allowing choices among continuous improvement, coaching, communication skills
- Developing an Entrepreneurial Mentality
- An end-of-year meeting billed as CEOs in Conversation

In addition, we visited the Brady Corporation focusing on human resource development, information technology and corporate communication. Also the EQL participants were invited to the 14th Annual Quality Symposium sponsored by the Metropolitan Milwaukee Association of Commerce and several other seminars organized for business people.

We have worked closely with the individual(s) making the presentation in order to insure that time was built into the program for reflection and dialogue among the participants. In most sessions, small group discussions, as well as a discussion in the total group, have taken place.

Issues We Faced and Continue to Face

One of the early hurdles that presented itself was an assumption of superiority on the part of business. The principals approached the early sessions clearly worried that they would be "put down," as so often happens in the media. They had reason to be suspicious. While the business participants didn't put them down, there was a definite attitude of "let me tell you how to run your schools." We anticipated this problem and took steps to minimize it, but the issue went away with the passage of time more than because of anything specific that was done. As the school and business participants spent more time with each other, the climate changed from suspicion and superiority to collaboration and mutual respect. Some participants have now spent two years with each other and the relationships are friendly and collaborative.

A second issue from the beginning was how to maintain gender and racial diversity among the participants. The volunteer group of principals was fortunately nicely diversified along race and gender lines. Recruiting a diverse group of business participants was a much more difficult problem, one we have not been fully successful at solving. Perhaps reflecting the nature of the business world, the women we recruited as business participants were from the staff ranks in companies and not from the ranks of higher management. Two of these women were African-American. We were able to recruit two African American men, but one of them did not continue with the program beyond the first year.

A third issue has been the on-going effort to modify the program based on feedback from participants. It is clear that the most valued component has been the opportunity to have conversations between business people and school people and also for the principals to talk with

each other. We have struggled with how to maximize these opportunities. Another struggle has been to establish coherence among the various monthly programs so that the experiences are clearly related to each other and one builds on the next. We believe that these two problems have contributed to the less than satisfactory attendance by the principals at the monthly sessions. Interestingly, the business participants have been much more regular in their attendance than the principals have. As we approach the third year, the challenge is to re-invent the program in such a way that these two problems can be solved. Indeed, the challenge is perhaps to break out of the overall pattern that has guided the program thus far and develop something entirely new.

A fourth issue relates to change at the University. Although the GE Fund program officer noted that he could find only two settings where the Business and Education schools were willing to collaborate, that willingness does not necessarily translate into fundamental change within our own settings. For example, the among of content from the work with EQL principals that has found its way into the preparation program for future MPS principals is rather minimal. No business faculty are involved and the courses are the same as in our other programs. Individual Education faculty members who have been involved in the EQL program have introduced some new content into the courses, but there has not been wholesale change.

A final issue is essentially how to take greater advantage of the willingness of local business and industry to participate in this endeavor. Businesses have been willing to let key employees take a good part of a day off from their regular responsibilities to attend these monthly meetings. Businesses have welcomed the group into their workplaces for extensive presentations by their people and extended conversations with them. The local Association of Commerce has been helpful in locating presenters and inviting us to their annual symposium at greatly reduced

cost. Other groups have also been helpful. The challenge is to continue this involvement beyond the time of this specific project and to somehow parlay it into greater opportunities for more principals and eventually to have a systemic impact on the school system..